

## **This schedule applies to: Office of the Secretary of State**

### **Scope of records retention schedule**

This records retention schedule authorizes the destruction/transfer of the public records of the Office of the Secretary of State relating to the unique functions of the Secretary of State. The schedule is to be used in conjunction with the *State Government General Records Retention Schedule (SGGRRS)*, which authorizes the destruction/transfer of public records common to all state agencies.

### **Disposition of public records**

Public records covered by records series within this records retention schedule (regardless of format) must be retained for the minimum retention period as specified in this schedule. Washington State Archives strongly recommends the disposition of public records at the end of their minimum retention period for the efficient and effective management of state resources.

Public records designated as “Archival (Permanent Retention)” must not be destroyed. Records designated as “Archival (Appraisal Required)” must be appraised by the Washington State Archives before disposition. Public records must not be destroyed if they are subject to ongoing or reasonably anticipated litigation. Such public records must be managed in accordance with the agency’s policies and procedures for legal holds. Public records must not be destroyed if they are subject to an existing public records request in accordance with chapter 42.56 RCW. Such public records must be managed in accordance with the agency’s policies and procedures for public records request.

### **Revocation of previously issued records retention schedules**

All previously issued records retention schedules to the Office of the Secretary of State (including abolished state agencies whose records were transferred to Washington State Archives in accordance with RCW 40.14.030(1)) are revoked. The Office of the Secretary of State must ensure that the retention and disposition of public records is in accordance with current, approved records retention schedules.

### **Authority**

This records retention schedule was approved by the State Records Committee in accordance with RCW 40.14.050 on June 3, 2015.

*Signature on File*

**For the State Auditor:**  
Cindy Evans

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**For the Attorney General:**  
Isaac Williamson

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**For the Office of Financial Management:**  
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**The State Archivist:**  
Steve Excell

## REVISION HISTORY

Version	Date of Approval	Extent of Revision
1.0	December 3, 2014	Consolidation and revision of all existing records retention schedules.
1.1	June 3, 2015	Minor revision to the Corporations Registration section.

For assistance and advice in applying this records retention schedule,  
please contact the Office of the Secretary of State's Records Officer

or Washington State Archives at:

[recordsmanagement@sos.wa.gov](mailto:recordsmanagement@sos.wa.gov)

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## 1. ADDRESS CONFIDENTIALITY SERVICES

The function of providing address confidentiality services in accordance with chapter 40.24 RCW.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
92-05-50365 Rev. 1	<b><i>Address Confidentiality Program Exemptions – Granted</i></b> Publicly accessible documents that allow exceptions to 40.24 RCW. These consist of two files; the original of the exemption and copies of letters of transmittals to the heads of affected agencies; and documents generated in the development of the exemption - the original notification of intent (if any), the original request, correspondence, drafts of exemptions and, in cases where an appeal of a denial resulted in allowing an exemption, documents concerning the denial.	<b>Retain</b> for 6 years after exemption repealed <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
92-05-50364 Rev. 4	<b><i>Address Confidentiality Program Participant Records</i></b> Includes a history of the participant in the ACP program and cash receipt records.	<b>Retain</b> for 26 years after terminated, cancelled, or expired <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 2. ARCHIVES AND RECORDS MANAGEMENT SERVICES

The functions of preserving and making accessible the public records with enduring legal, research and historical value, authorizing the destruction/transfer of public records and assisting state and local government agencies to manage public records.

### 2.1 ACCESS AND RESEARCH SERVICES

*The activities associated with providing access and research/reference services to the records of the State of Washington which have ongoing, enduring value.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
14-12-68716 Rev. 0	<b><i>Additional Collection Information from Comments/Crowdsourcing</i></b> Records related to additional information about items in the collections received from researchers/general public. Includes, but is not limited to: <ul style="list-style-type: none"> <li>Comments received via the Digital Archives website providing additional information about records within the collection.</li> </ul>	<b>Retain</b> until no longer needed for agency business <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
84-03-33529 Rev. 3	<b><i>Finding Aids</i></b> Unpublished finding aids compiled/developed to assist access and use of the records within the archival collections. Includes, but is not limited to: <ul style="list-style-type: none"> <li>Superseded box content lists/transmittals.</li> </ul> Excludes: <ul style="list-style-type: none"> <li>Published finding aids covered by Publications (DAN GS 15008);</li> <li>Arrangement and description records covered by Collection Control Records (DAN 90-08-46642).</li> </ul>	<b>Retain</b> until no longer needed for agency business <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 2.1 ACCESS AND RESEARCH SERVICES

*The activities associated with providing access and research/reference services to the records of the State of Washington which have ongoing, enduring value.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
84-03-33522 Rev. 4	<p><b>Research/Reference Queries</b></p> <p>Records relating to research/reference queries received from the general public and government agencies concerning information contained within the archival collections. Also includes records documenting who from the general public and government agencies had physical access to which specific records within the archival collection in order to document the records' chain-of-custody and for collection security purposes.</p> <p>Includes, but is not limited :</p> <ul style="list-style-type: none"> <li>• Correspondence/communications with the requester;</li> <li>• Other internal and external correspondence/communications related to the query;</li> <li>• Research Activity Records/Logs;</li> <li>• Records within the Research Request database;</li> <li>• Records related to the provision of certified copies of items with the archival collections in accordance with RCW 40.14.0303(1);</li> <li>• Research room visitor logs.</li> </ul>	<p><b>Retain</b> for 10 years after end of calendar year</p> <p><i>then</i></p> <p><b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 2.2 ADVICE AND AGENCY SERVICES

*The activity of providing archives and records management advice to state and local government agencies and others.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
14-12-68717 Rev. 0	<p><b>Advice (Published Advice Development)</b></p> <p>Records relating to the research and development of published advice (such as guidelines, advice sheets, etc.) concerning the retention, appraisal, preservation, transfer, destruction and other aspects of the management of public records.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Drafts documenting significant basic steps in the development process (such as drafts used in external consultation, etc.);</li> <li>• Records documenting consultation with stakeholders;</li> <li>• Copies of research materials used as the basis for the advice;</li> <li>• Related correspondence.</li> </ul> <p>Excludes:</p> <ul style="list-style-type: none"> <li>• Records covered by Attorney General Letters, Informal Opinions and Correspondence (DAN GS 18002);</li> <li>• Records relating to the design/layout covered by Publications – Development (DAN GS 15009);</li> <li>• Final published advice covered by Publications (DAN GS 15008).</li> </ul>	<p><b>Retain</b> until published advice obsolete/superseded <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM



## 2.2 ADVICE AND AGENCY SERVICES

*The activity of providing archives and records management advice to state and local government agencies and others.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
03-11-60601 Rev. 1	<p><b>Advice (Queries)</b></p> <p>Records relating to the provision of advice by Washington State Archives to state and local government agencies concerning the retention, appraisal, preservation, transfer, destruction and other aspects of the management of public records.</p> <p>Also includes provision of advice to non-Washington government agencies (such as private companies, non-for-profit organizations, general public, interstate and international archives, etc.).</p> <p>Includes, but is not limited:</p> <ul style="list-style-type: none"> <li>• Queries seeking archives and records management advice;</li> <li>• Internal communication relating to advice queries;</li> <li>• Washington State Archives initiated communication to agencies concerning archives and records management advice (such as listserv notifications, etc.).</li> </ul> <p>Excludes records covered by:</p> <ul style="list-style-type: none"> <li>• Records Retention Schedules – Development/Review (DAN 83-10-33086);</li> <li>• Research/Reference Queries (DAN 84-03-3352).</li> </ul>	<p><b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR
92-01-49688 Rev. 4	<p><b>Essential Records Lists</b></p> <p>Lists of essential records submitted by agencies to Washington State Archives in accordance with RCW 40.10.010 where the lists are not included as part of the agency's records retention schedule.</p> <p>Also includes changes and revisions submitted by agencies.</p> <p>Excludes records covered by Records Retention Schedules – Approved (DAN 83-10-33085).</p>	<p><b>Retain</b> for 6 years after superseded <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL <b>ESSENTIAL</b> OPR

## 2.2 ADVICE AND AGENCY SERVICES

*The activity of providing archives and records management advice to state and local government agencies and others.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
06-09-61318 Rev. 1	<p><b>Records Officer Appointment Notifications</b></p> <p>Records relating to the notifications received by Washington State Archives from state and local government agencies concerning the appointment of records officers for the agency.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Notifications received from state agencies in accordance with RCW 40.14.040;</li> <li>• Notifications received from local government agencies;</li> <li>• Related correspondence/communications.</li> </ul>	<p><b>Retain</b> for 6 years after termination of appointment <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR
97-08-58035 Rev. 2	<p><b>Supply Requests</b></p> <p>Records relating to requests from state and local government agencies for supplies to manage their public records (such as boxes, labels, etc.).</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Supply request forms;</li> <li>• Related correspondence/communications.</li> </ul>	<p><b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 2.3 COLLECTION AND REPOSITORY MANAGEMENT

*The activities associated with managing the intellectual and physical control of Washington State Archives' records collections (such as archival collections, records center holdings; essential records holdings, etc.). Includes accessioning, processing, deaccessioning, and physical/digital repository management.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
90-08-46642 Rev. 4	<p><b>Collection Control Records</b></p> <p>Records documenting the legal transfer of custody, accessioning, arrangement and description, processing and deaccessioning/dispositioning of records of state and local government (as well as private records acquired through donations/purchases) into collections controlled and/or managed by Washington State Archives (such as the archival collections, records center holdings, essential records holdings, etc.).</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Accession registers;</li> <li>• Collection files;</li> <li>• Control records within collection systems (such as ARC-CAT, RMS, and security microfilm databases, etc.)</li> <li>• Deeds of gift;</li> <li>• Records relating to digitization, indexing and preservation projects;</li> <li>• Records documenting the charging out of archival records to their agencies of origin for purposes expressly approved by the State Archivist;</li> <li>• Planned box disposition reports;</li> <li>• Security microfilm inspections;</li> <li>• Shelf checks/inventorying/location records;</li> <li>• Transmittals and box content lists.</li> </ul>	<p><b>Retain</b> for life of the archives <i>then</i> <b>Destroy.</b></p>	<p>NON-ARCHIVAL <b>ESSENTIAL</b> OPR</p>

## 2.4 DISPOSITION AUTHORIZATION

*The activity of authorizing the destruction/transfer of public records of state and local government agencies.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
83-10-33085 Rev. 5	<p><b>Records Retention Schedules – Approved</b></p> <p>Records documenting the authorization granted to state and local government agencies for disposition (destruction/transfer) of public records.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>Records retention schedules approved by the State Records Committee in accordance with RCW 40.14.050;</li> <li>Records retention schedules approved by the Local Records Committee in accordance with RCW 40.14.070;</li> <li>Final versions of revision guides/summary of changes prepared by Washington State Archives documenting the changes between versions of records retention schedules;</li> <li>Indexes and finding aids such as Disposition Authority Number (DAN) assignment logs, records retention schedule database (such as Genasys, LGRRS, etc.).</li> </ul>	<p><b>Retain</b> until no longer needed for agency business <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR</p>

## 2.4 DISPOSITION AUTHORIZATION

*The activity of authorizing the destruction/transfer of public records of state and local government agencies.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
83-10-33086 Rev. 1	<p><b>Records Retention Schedules – Development/Review</b></p> <p>Records relating to the development and review of records retention schedules.</p> <p>Includes, but is not limited:</p> <ul style="list-style-type: none"> <li>• Drafts documenting significant basic step in development process (such as drafts used in external consultation, etc.)</li> <li>• Records documenting consultation with reference groups and stakeholders;</li> <li>• Appraisal decisions made as part of the retention schedule development process;</li> <li>• Copies of research materials used as the basis for retention periods;</li> <li>• Related correspondence/communications.</li> </ul> <p>Excludes records covered by:</p> <ul style="list-style-type: none"> <li>• Records Retention Schedules - Approved (DAN 83-10-33086);</li> <li>• Attorney General Letters, Informal Opinions and Correspondence (DAN GS 18002).</li> </ul>	<p><b>Retain</b> for 2 years after schedule superseded</p> <p><i>then</i></p> <p><b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OFM</p>

### 3. ASSET MANAGEMENT

This section covers records relating to managing the agency's physical assets (facilities, land, equipment, vehicles, supplies, etc.) which are not currently covered by the *State Government General Records Retention Schedule*.

See *State Government General Records Retention Schedule* for additional records relating to asset management.

#### 3.1 INSPECTION/MONITORING

*The activities associated with observing, examining, testing, calibrating, measuring or otherwise evaluating/confirming the functionality, safety, or performance of the agency's assets.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
97-08-58036 Rev. 1	<b><i>Inspections/Monitoring – Routine/Non-Regulated</i></b> Records relating to the routine inspecting/monitoring of assets owned, used or maintained by the agency which are not required by regulatory agencies and not covered by a more specific records series. Includes, but is not limited to: <ul style="list-style-type: none"><li>• Temperature and humidity records;</li><li>• Equipment functionality/safety checks (such as vehicle daily checks, etc.).</li></ul>	<b>Retain</b> until no longer needed for agency business <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 4. CHARITIES REGISTRATION

The function of registering individuals, organizations and commercial fundraisers that raise or collect contributions from the general public to support charitable activities. Also includes the function of registering Charitable Trusts in Washington State.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
90-09-46660 Rev. 6	<p><b>Charitable Solicitations Registration</b></p> <p>Records relating to the registration of charitable solicitations in accordance with the Charitable Solicitations Act (chapter 19.09 RCW).</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Applications for registration;</li> <li>• Renewals and amendments;</li> <li>• Registration records within the charities registration system;</li> <li>• Related correspondence/communications.</li> </ul> <p>Excludes records relating to the incorporation of nonprofit organizations covered by Corporate Filings (DAN 71-11-01807).</p>	<p><b>Retain</b> for 6 years after closed/failure to renew <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR
01-11-60270 Rev. 3	<p><b>Charitable Trusts Registration</b></p> <p>Records relating to the registration of registration of charitable trusts in accordance with the Charitable Trusts Act (chapter 11.110 RCW).</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Applications for registration;</li> <li>• Renewals and amendments;</li> <li>• Registration records within the charities registration system;</li> <li>• Related correspondence/communications.</li> </ul> <p>Excludes records covered by Charitable Trust Registration – Paper Records that have been Imaged (DAN 14-12-68729).</p>	<p><b>Retain</b> for 6 years after closed/failure to renew <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
14-12-68729 Rev. 0	<p><b><i>Charitable Trusts Registration – Paper Records that have been Imaged</i></b></p> <p>Paper-based source records relating to the registration of registration of charitable trusts in accordance with the Charitable Trusts Act (chapter 11.110 RCW) that have been imaged, provided that:</p> <ul style="list-style-type: none"> <li>Source records have been imaged in accordance with Washington State Archives' <i>Requirements for the Destruction of Non-Archival Paper Records after Imaging</i>; and</li> <li>Digital images of charitable trusts registration have been retained in accordance with Charitable Trusts Registration (DAN 01-11-60270).</li> </ul>	<p><b>Retain</b> until verification of successful conversion <i>then</i> <b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>



## 5. COMBINED FUND DRIVE COORDINATION

The function of providing whole of government coordination of the Combined Fund Drive across state government agencies.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
10-12-62327 Rev. 0	<b><i>Washington State Combined Fund Drive Contribution Form</i></b> The Washington State Combined Fund Drive Contribution Form which is filled out by the contributor to show how much money they would like to donate to a particular charity and how the money will be disbursed (monthly deduction or one-time payment).	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
10-12-62328 Rev. 1	<b><i>Washington State Combined Fund Drive Financial Reports and Campaign Guides</i></b> Combined Fund Drive financial reports and campaign guides of charities.	<b>Retain</b> for 1 year after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL <b>ESSENTIAL</b> OPR

## 6. CORPORATIONS REGISTRATION

The function of registering corporations.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
11-04-62443 Rev. 0	<p><b><i>Annual Report/Renewal Reminder Notices</i></b></p> <p>Notices sent to registered corporations as a reminder to submit annual reports and renew registration with the Office of the Secretary of State.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Lists documenting to whom notices were sent;</li> <li>• Notices returned as undeliverable.</li> </ul>	<p><b>Retain</b> for 1 year after end of month <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM
94-06-53770 Rev. 2	<p><b><i>Apostilles and Certificates</i></b></p> <p>Correspondence from constituents regarding the Certificate and Apostille process. Copies of documentation where Apostilles and Certificates are issued.</p>	<p><b>Retain</b> for 6 years after end of month <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
71-11-01807 Rev. 6	<p><b>Corporate Filings</b></p> <p>Documents filed with the Office of the Secretary of State by Corporations, Social Purpose Corporations, nonprofits, LLP, LP's, LLLP's, LLC's and general partnerships.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>Articles of Incorporation (including amendments);</li> <li>Mergers/Dissolutions/Reinstatements;</li> <li>Annual Reports (including initial reports and amended reports);</li> <li>License Renewals;</li> <li>Statement of Change;</li> <li>Resignation of Officers and Registered Agents.</li> </ul> <p>Excludes records covered by:</p> <ul style="list-style-type: none"> <li>Corporate Filings – Paper Records that have been Imaged (DAN 15-06-XXXXX);</li> <li>Profit Corporation License Renewal/Annual Report (DAN 71-11-01806).</li> </ul>	<p><b>Retain</b> for 10 years after date of dissolution or received date, whichever is sooner <i>then</i></p> <p><b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR</p>
15-06-68748 Rev. 0	<p><b>Corporate Filings – Paper Records that have been Imaged</b></p> <p>Paper-based source records filed with the Office of the Secretary of State by Corporations, Social Purpose Corporations, nonprofits, LLP, LP's, LLLP's, LLC's and general partnerships that have been imaged, provided that:</p> <ul style="list-style-type: none"> <li>Source records have been imaged in accordance with Washington State Archives' <i>Requirements for the Destruction of Non-Archival Paper Records after Imaging</i>; and</li> <li>Digital images of the corporate filings have been retained in accordance with Corporate Filings (DAN 71-11-01807).</li> </ul>	<p><b>Retain</b> until verification of successful conversion <i>then</i></p> <p><b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
04-12-60841 Rev. 0	<b>Digital Signature Files</b> Contains Certificate of Authority and Certified Operative personnel and other records relating to the Electronic Authentication Action as required by RCW 19.34.	<b>Retain</b> for 10 year after failure to renew <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
04-12-60840 Rev. 0	<b>Incorporation Name Reservation Files</b> Filed by potential corporations to reserve a company's name.	<b>Retain</b> for 180 days after filing <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
99-09-59286 Rev. 0	<b>International Student Exchange Agency (ISEA)</b> Registration and re-registration of applications. ISEAs apply and re-apply for registration on an annual basis. Re-registration is not based on prior registration. ISEAs are registered with this office (Corporations) prior to placing foreign exchange students into secondary schools. Approximately 50 agencies register and re-register annually. This is not part of Corporations, but there is a filing fee, which is tracked in the database for 6 years.	<b>Retain</b> for 2 years after June 15 <sup>th</sup> each year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
09-04-61994 Rev. 0	<b>Notice of Incomplete Filing</b> Letters generated by the filing system to the applicant regarding the rejection of documents for filings in the Corporations and Charities Division.	<b>Retain</b> for 1 year after end of month <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
71-11-01806 Rev. 3	<b><i>Profit Corporation License Renewal/Annual Report</i></b> Includes but is not limited to: <ul style="list-style-type: none"> <li>Annual renewal of profit corporations, LLC's, LLP's, and annual reports. Received at Dept. of Revenue or Corporations and transferred into the Corporations imaging system.</li> </ul>	<b>Retain</b> until received/entered <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OFM
84-02-33458 Rev. 1	<b><i>Summons and Complaints</i></b> Notice that a summons/complaint or other legal documents have been filed against a nonresident motorist, corporation or entity in the state of Washington served on the Secretary of State as an agent for the said motorist, corporation or entity.	<b>Retain</b> for 6 years after date of issue <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
04-02-60656 Rev. 2	<b><i>Trademarks</i></b> Records documenting the registration of unique marks, symbols, or names used to identify a specific project or service in accordance with chapter 19.77 RCW. <i>Note: Also includes history cards.</i>	<b>Retain</b> for 6 years after expiration of trademark <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR

## 7. DOMESTIC PARTNERSHIPS REGISTRATION

The function of registering domestic partnerships.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
07-06-61537 Rev. 1	<p><b><i>Domestic Partnerships Registration Documentation</i></b></p> <p>Documents filed with the Office of the Secretary of State in relation to registered domestic partnerships in accordance with chapter 26.60 RCW.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Declarations of state registered domestic partnerships;</li> <li>• Database records relating to domestic partnership registration;</li> <li>• Notices of termination of state registered domestic partnerships and affidavits of service (prior to 2009).</li> </ul>	<p><b>Retain</b> for 50 years after date of filing <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.</p>	<p><b>ARCHIVAL</b> (Appraisal Required) <b>ESSENTIAL</b> OPR</p>

## 8. ELECTION MANAGEMENT

The function of administrating elections and voter registration.

### 8.1 ELECTION ADMINISTRATION

*The activity of administering elections.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
10-06-62218 Rev. 0	<b><i>Ballot Status Transaction Messages and Data</i></b> Ballot status data sent between County voter registration and the state for the Washington Election Information System (WEI).	<b>Retain</b> for 1 year after transaction date <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
14-12-68718 Rev. 0	<b><i>Certificate of Ballot Mailing</i></b> Certifications received from the county of elections mailings.	<b>Retain</b> for 22 months after date of election <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
04-02-60653 Rev. 1	<b><i>Certification of County Election Administrators</i></b> Applications for certification and related materials. WAC 434-260-307.	<b>Retain</b> for 2 years after failure to reapply for active status <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 8.1 ELECTION ADMINISTRATION

*The activity of administering elections.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-03-22078 Rev. 3	<b><i>Certification of Statewide Results</i></b> Documents the canvass and certification of statewide elections. Includes proclamation of statewide measures, certification reports and by precinct reports.	<b>Retain</b> for 1 year after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR
04-02-60651 Rev. 0	<b><i>Certification of Vote Tabulating System</i></b> Certification and supporting documents for vote tabulating systems.	<b>Retain</b> for 6 years after machine is discontinued <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
05-01-60880 Rev. 1	<b><i>Constitutional Amendments and State Measure Legal Notices</i></b> This series contains the legal notices of the Office of the Secretary of State is required to publish in newspapers in accordance with RCW 29A.52.330 for amendments and State measures such as referendums and initiatives.	<b>Retain</b> for 3 months after election <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL <b>ESSENTIAL</b> OFM
79-03-22071 Rev. 1	<b><i>Declarations of Candidacy</i></b> Documents names, addresses, and related information on candidates for state and federal office.	<b>Retain</b> for 30 months after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR



## 8.1 ELECTION ADMINISTRATION

*The activity of administering elections.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
09-09-62113 Rev. 1	<b>Help America Vote Act – HAVA</b> Documents related to the Federal mandated program to improve Elections administration and replacement of punch card and lever voting machines.	<b>Retain</b> for 6 years after completion of project <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL <b>ESSENTIAL</b> OPR
08-05-61782 Rev. 1	<b>Lists of Presidential Primary Participants</b> List of voters who participate in the presidential nominating process of major political parties in accordance with RCW 29A.56.050.	<b>Retain</b> for 22 months after date of presidential primary <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL <b>ESSENTIAL</b> OPR
04-02-60650 Rev. 1	<b>Logic and Accuracy Tests</b> Tests attended by the state elections office to test vote tabulating equipment at counties.	<b>Retain</b> for 2 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-03-22072 Rev. 1	<b>Minor Political Party and Independent Candidate Nominating Convention Reports</b> Document formation of minor parties and nomination of minor party and independent candidates to public office. Also include confirmation letter sent to the party or candidate.	<b>Retain</b> for 6 months after certification of election <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR

## 8.1 ELECTION ADMINISTRATION

*The activity of administering elections.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-03-22073 Rev. 0	<b>Minor Political Party and Independent Candidate Petitions</b> Document signatures of persons who attend nominating conventions for minor party and independent candidates.	<b>Retain</b> for 1 month after notification of validity <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
07-08-61581 Rev. 1	<b>Precinct Returns of State-Wide Elections</b> The electronic files containing vote totals by precinct, or by combination of precincts if applicable, for general elections and other election returns as directed. Paper copies are retained for one year in office then archived under DAN 79-03-22078.	<b>Retain</b> for 10 years after calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
10-06-62219 Rev. 0	<b>Precinct/District Transaction Messages</b> Precinct/district correspondence/messages sent between County voter registration systems and the state for the Washington Election Information System (WEI).	<b>Retain</b> for 1 year from transaction date <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
04-02-60652 Rev. 1	<b>Review of County Procedures – Final Report/Follow-up</b> Final reports of reviews into County procedures for the conducting of elections in accordance with RCW 29A.04.570 and chapter 434-260 WAC. Also includes records documenting the follow-up verification conducted 1 year after the report in accordance with RCW 29A.04.570(3) and WAC 434-260-155.	<b>Retain</b> until superseded by subsequent report <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 8.1 ELECTION ADMINISTRATION

*The activity of administering elections.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
14-12-68721 Rev. 0	<p><b>Review of County Procedures – Report Development</b></p> <p>Records relating to conducting of reviews and development of final reports into County's procedures for the conducting of elections in accordance with RCW 29A.04.570 and chapter 434-260 WAC.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Notices given to County Auditors and the chairs of state central committees of major parties in accordance with RCW 29A.04.570(1)(c); WAC 434-260-040; WAC 434-260-050; and WAC 434-260-060;</li> <li>• Preliminary review reports in accordance with WAC 434-260-130;</li> <li>• Draft election review reports in accordance with WAC 434-260-140;</li> <li>• Responses to draft election review reports from County Auditors and/or County Canvassing Boards in accordance with WAC 434-260-145);</li> <li>• Notes and materials submitted by the Counties;</li> <li>• Related correspondence/communications.</li> </ul> <p>Excludes records covered by Review of County Procedures – Final Report/Follow-up (DAN 04-02-60652).</p> <p><i>Note: Appeal period is 30 days.</i></p>	<p><b>Retain</b> for 30 days after final report issued <i>and</i> conclusion of any appeal processes <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR
10-06-62220 Rev. 0	<p><b>Washington Election Information (WEI) Logging Database Error Logs</b></p> <p>Error logs posted in Washington Election Information logging database.</p>	<p><b>Retain</b> for 1 year from transaction date <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 8.2 INITIATIVE/REFERENDA/RECALL PETITION CERTIFICATION

*The activity of certifying initiative/referenda/recall petitions.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
07-08-61580 Rev. 2	<b><i>Initiative/Referenda/Recall Petitions</i></b> Initiative/referenda/recall petitions filed with the Secretary of State in accordance with RCW 29A.72 and RCW 29A.56.110-270, provided a security copy is retained in accordance with Initiative/Referenda/Recall Petitions – Security Copy (DAN 14-12-68723).	<b>Retain</b> for 3 months after certification <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL <b>ESSENTIAL</b> OPR
14-12-68723 Rev. 0	<b><i>Initiative/Referenda/Recall Petitions – Security Copy</i></b> Security backup copy of initiative/referenda/recall petitions filed with the Secretary of State in accordance with RCW 29A.72 and RCW 29A.56.110-270. Includes, but is not limited to: <ul style="list-style-type: none"> <li>Imaged initiative petition sheets.</li> </ul> <i>Note: Replaces DAN 79-MF-22103.</i>	<i>Upon creation</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
79-03-22097 Rev. 4	<b><i>Petition Filing/Certification</i></b> Records documenting the filing and certification of initiative/referenda/recall petitions filed with the Secretary of State.	<b>Retain</b> for 1 year after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR

## 8.2 INITIATIVE/REFERENDA/RECALL PETITION CERTIFICATION

*The activity of certifying initiative/referenda/recall petitions.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
07-08-61579 Rev. 1	<b><i>Petition Signature Checking</i></b> Records documenting accepted and rejected signatures from any initiative that filed signatures and a comparison that was conducted according to statute. Includes, but is not limited to: <ul style="list-style-type: none"><li>Records in the Secretary of State's Initiative Checking Database.</li></ul>	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

### 8.3 REDISTRICTING

*The activity of redrawing legislative and congressional district boundaries.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
83-01-31083 Rev. 1	<b>Census Mapping Project</b> Document development of census and election information for redistricting by the legislature.	<b>Retain</b> for 12 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
92-06-50725 Rev. 2	<b>Redistricting Commission Files</b> Records created by the Redistricting Commission pertaining to the redrawing of legislative and congressional district boundaries. Based on the previous federal census done every 10 years.	<b>Retain</b> for 10 years after close of the Commission <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR

## 8.4 VOTER REGISTRATION

*The activities associated with the registration of voters.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
09-11-62155 Rev. 0	<b>Cancelled Voter Registration</b> Each cancelled voter registration in the Voter Registration Database (VRDB).	<b>Retain</b> for 3 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-03-22094 Rev. 3	<b>Current Voter Registration Records</b> These voter registration records provide verification of the signatures on initiatives, referendums, recall petitions and nomination petitions.	<b>Retain</b> until update received <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
11-08-62775 Rev. 0	<b>Department of Licensing Data for VRDB and ERIC</b> Data is provided for disaster recovery and for supplying the ERIC Project (Electronic Registration Information Center).	<b>Retain</b> for 3 months after date of document <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
04-12-60842 Rev. 1	<b>Motor Voter Records</b> A list of people provided by the Department of Licensing who have registered to vote when visiting a DOL office.	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-03-22093 Rev. 1	<b>New Registration Control Records</b> Document receipt and handling of voter registration records.	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 8.4 VOTER REGISTRATION

*The activities associated with the registration of voters.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
07-08-61576 Rev. 1	<p><b><i>Voter Registration Database (VRDB)</i></b></p> <p>The statewide VRDB maintains the official state voter registration list per requirements of the Help America Vote Act. The VRDB interfaces with the Department of Licensing, Department of Health, Department of Corrections, and other state databases. The VRDB also interfaces with election/registration management systems operated by the state's 39 counties.</p> <p><i>Note: Between December 15th and December 30th of each year, a copy of the database including the transaction log and user manual(s) are sent to Digital Archives for historical preservation.</i></p>	<p><b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.</p>	<p><b>ARCHIVAL</b> (Appraisal Required) <b>ESSENTIAL</b> OPR</p>
11-02-62428 Rev. 0	<p><b><i>Voter Registration Notifications</i></b></p> <p>All Voter Notifications for Voter Registration. Includes, but not limited to:</p> <ul style="list-style-type: none"> <li>• Federal notification;</li> <li>• Correspondence with regular and felon voters;</li> <li>• Undeliverable returned envelopes from the mail.</li> </ul>	<p><b>Retain</b> for 2 years after end of month <i>then</i> <b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OFM</p>



## 8.4 VOTER REGISTRATION

*The activities associated with the registration of voters.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
11-08-62774 Rev. 0	<b><i>Voter Registration Source Materials</i></b> Includes, but is not limited to data obtained from: <ul style="list-style-type: none"> <li>• The Administration of the Courts;</li> <li>• The Department of Corrections;</li> <li>• The Department of Health;</li> <li>• The Department of Licensing;</li> <li>• The Social Security Death Index;</li> <li>• The Washington State Patrol;</li> <li>• The ERIC Project (Electronic Registration Information Center).</li> </ul>	<b>Retain</b> for 3 years after date of document <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
10-06-62222 Rev. 0	<b><i>Voter Registration Transaction Messages</i></b> Voter registration correspondence/messages sent between County voter registration systems and the statewide Voter Registration Database (VRDB).	<b>Retain</b> for 1 year after transaction date <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
07-08-61577 Rev. 0	<b><i>VRDB Public Extract CD</i></b> The VRDB monthly public extract CD is an electronic CD version of the official state voter registration database and is available to the media, political parties and other members of the public by request. Only data that is public by law is provided. The extract is produced once per month on CD format.	<b>Retain</b> for 1 year after end of month <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 9. FINANCIAL MANAGEMENT

This section covers records relating to managing the agency's financial resources, obligations and monetary infrastructure which are not covered by the *State Government General Records Retention Schedule*.

See *State Government General Records Retention Schedule* for additional records relating to financial management.

### 9.1 AUTHORIZATION

*The activity of seeking and granting permission to undertake a requested action.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
04-11-60820 Rev. 0	<b><i>Signature Authority/Delegation Records</i></b> Contains signed authorizations giving designated personnel the authority to sign for purchases, leave slips, or other documents.	<b>Retain</b> for 6 years after no longer designated as signature authority <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 10. LEGACY PROJECT

The function of documenting life stories of influential people in Washington State through the production of biographies and oral histories.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
99-01-59004 Rev. 2	<b><i>Interviewee Subject Files</i></b> All documents (whether electronic, paper, or audio) pertaining to current interviewees.	<b>Retain</b> for 4 years after date of publication <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OFM

## 11. OFFICIAL FILINGS

The function of managing documents that are required to be filed/deposited with the Secretary of State.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
14-12-68719 Rev. 0	<p><b>Official Filings</b></p> <p>Documents required by statute to be filed with the Secretary of State which are not covered by a more specific records series.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Oaths of Office;</li> <li>• Official bonds of state officers filed with the Secretary of State in accordance with RCW 42.08.100;</li> <li>• Certificates of Manual Signatures filed with the Secretary of State in accordance with RCW 39.62.020;</li> <li>• Adoption of municipal code form of government by cities and towns filed with the Secretary of State in accordance with RCW 35A.02.040;</li> <li>• Notices of incorporation of cities and towns filed with the Secretary of State in accordance with RCW 35.02.130;</li> <li>• Conservation Districts creation/amendment documentation filed with the Secretary of State and certificates issued by the Secretary of State in accordance with RCW 89.08.160 and RCW 89.08.170;</li> <li>• Orders establishing Mosquito Control Districts filed with the Secretary of State in accordance with RCW 17.28.090;</li> <li>• Joint Municipal Utility Services Agreements (and amendments) filed with the Secretary of State in accordance with RCW 39.106.030.</li> </ul>	<p><i>Upon receipt</i></p> <p><b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR</p>

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
14-12-68720 Rev. 0	<p><b><i>Records of the State Legislature</i></b></p> <p>Documents filed with the Secretary of State by the State Legislature.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Session laws;</li> <li>• Concurrent and floor resolutions;</li> <li>• Joint memorials and resolutions (including proposed state constitutional amendments and the approval of proposed amendments to the federal constitution).</li> </ul>	<p><i>Upon receipt</i></p> <p><b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR</p>

## 12. PRODUCTIVITY BOARD

The function of reviewing suggestions for improved public service and increased efficiency.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
96-02-56517 Rev. 4	<b><i>Employee Suggestion and Teamwork Incentive (TIP) Program</i></b> Includes, but is not limited to: <ul style="list-style-type: none"> <li>• Correspondence regarding evaluation; adopts, non-adopts, ineligible, duplicates, further developments, and multiple agency suggestions;</li> <li>• Applications;</li> <li>• Quarterly reports;</li> <li>• Final report;</li> <li>• Photographs.</li> </ul>	<b>Retain</b> for 10 years after final board action <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
03-11-60607 Rev. 1	<b><i>Productivity Board Section Subject Files</i></b> Files on the activities and issues of concern to the Productivity Board and its administration. May contain budget and Employee Recognition Event information, press releases, allotment schedules, and relevant correspondence.	<b>Retain</b> for 4 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
96-02-56519 Rev. 2	<b><i>Public Service Recognition Week</i></b> Includes, but is not limited to: <ul style="list-style-type: none"> <li>• Correspondence;</li> <li>• Meeting notes;</li> <li>• Schedule of event;</li> <li>• Planning sessions.</li> </ul>	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL <b>ESSENTIAL</b> OPR

### 13. SALARY COMMISSION MEMBERSHIP SELECTION

The function of selecting citizens to serve on the Washington Citizens' Commission on Salaries for Elected Officials.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
14-12-68722 Rev. 0	<p><b><i>Salary Commission Membership Selection</i></b></p> <p>Records relating to the selection by lot of citizens to serve on the Washington Citizens' Commission on Salaries for Elected Officials in accordance with RCW 43.03.305 and chapter 434.209 WAC.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>Records relating to the conduct of the selection by lot;</li> <li>Response forms received from citizens;</li> <li>Certified list of names forwarded to the Governor.</li> </ul>	<p><b>Retain</b> for 6 years after completion of selection <i>then</i> <b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>

## 14. STATE LIBRARY SERVICES

The function of providing library services which are not covered by the *State Government General Records Retention Schedule*.

See *State Government General Records Retention Schedule* for additional records relating to library services.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
89-04-43906 Rev. 2	<b>Branch Library Administrative Files</b> Contains monthly reports and historical and/or background information on the specific branch library and its function.	<b>Retain</b> for 4 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL <b>ESSENTIAL</b> OFM
04-09-60781 Rev. 0	<b>Copyright/Deed of Gift File</b> Contains correspondence and reference materials relating to copyright issues.	<b>Retain</b> for 10 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR
04-09-60785 Rev. 0	<b>E-Rate Files</b> This series contains the Technology Plan which every library is required to submit to the State Library to be eligible for federal grants. Related material includes Application Forms, CIPA Internet Safety Policy, and Letter of Agency. Also included are forms 470, 471, 472, and 486, and correspondence between WSL, USAC, and public libraries.	<b>Retain</b> for 10 years after end of federal fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR



DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
04-09-60786 Rev. 0	<b><i>Librarian Certification Records</i></b> Contains a record of every librarian certified by the State Library.	<b>Retain</b> for 10 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR
93-11-53234 Rev. 4	<b><i>Library Council of Washington</i></b> Agendas, meeting notes/minutes, applications, appointments, and correspondence.	<b>Retain</b> for 9 years after end of federal fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OPR
04-11-60811 Rev. 1	<b><i>Library Patron Registration Records</i></b> Records documenting the registration of patrons of the Washington State Library. Includes, but is not limited to: <ul style="list-style-type: none"> <li>Records within the patron registration database;</li> <li>Signed applications for library cards.</li> </ul> <i>Note: Signed applications are evidence of the patron's acceptance of their financial responsibility.</i>	<b>Retain</b> for 6 years after failure to renew library account <i>and</i> 6 years after resolution of library fines (if any) <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
04-09-60784 Rev. 2	<b><i>Library Services and Technology Act (LSTA) Files</i></b> All activities funded by LSTA including but not limited to projects, grants, workshops; IMLS correspondence; WILL workshops; Annual Reports; Continuing Education Grants; 5-Year Plans; and 5-Year Evaluations.	<b>Retain</b> for 9 years after submission of annual report <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
04-11-60813 Rev. 1	<b><i>Public Services Spreadsheet</i></b> A spreadsheet documenting gate count, reference, microfilm, public computer usage, reception and circulation statistics.	<b>Retain</b> for 10 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
04-11-60810 Rev. 1	<b><i>Reference Requests</i></b> Records relating to reference queries received by the State Library from the general public and government agencies. Includes, but is not limited to: <ul style="list-style-type: none"> <li>Records documenting reference questions and answers within the eReference and QuestionPoint databases;</li> <li>Related correspondence/communications.</li> </ul>	<b>Retain</b> until no longer needed for agency business <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 15. LEGACY RECORDS

This section covers records no longer being created or received by the Office of the Secretary of State which have yet to reach their minimum retention period.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
99-01-59006 Rev. 3	<b><i>Advisory Committee Files (Legacy Project)</i></b> Reports, policies and correspondence, both paper and electronic, prepared for review by the Secretary of State and Advisory Committee.	<b>Retain</b> for 3 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) <b>ESSENTIAL</b> OFM
05-11-61010 Rev. 1	<b><i>Electronic Imaging Systems (EIS)/Destruction After Digitization (DAD) – Reviews and Approvals</i></b> Records relating to reviews of Electronic Imaging Systems (EIS)/Destruction After Digitization (DAD) applications approved or denied by Washington State Archives.	<b>Retain</b> for 6 years after approval expires/application denied <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
87-03-39496 Rev. 2	<b><i>Employment Security Order (Employment Security Department Assessments)</i></b> Documents assessment contributions, penalties, and interest amounts owed to Department of Employment Security.	<b>Retain</b> until no longer needed for agency business <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
04-12-60839 Rev. 1	<b><i>Immigration Assistant Files</i></b> Records relating to the registration of immigration assistance in accordance with chapter 19.154 RCW prior to 2011. <i>Note: Program ceased in 2011.</i>	<b>Retain</b> for 6 years after program ceased <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
87-03-39486 Rev. 2	<b><i>Local Agency Microfilm Project Authorization Request (SSA-31)</i></b> Documentation of microfilm projects approvals made by the State Archivist and the State Auditor and processed by the Division. Maintained on Microfilm for security purposes.	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
97-08-58034 Rev. 2	<b><i>Records Center Box Pick-Up Confirmation</i></b> Records documenting the results of Records Center staff pick-up of agency records showing if all boxes were picked up, if some were rejected, or if boxes were missing.	<b>Retain</b> for 2 years after end of month <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## GLOSSARY

### ***Appraisal***

The process of determining the value and disposition of records based on their current administrative, legal, and fiscal use; their evidential and informational or research value; and their relationship to other records.

### ***Archival (Appraisal Required)***

Public records which may possess enduring legal and/or historic value and must be appraised by the Washington State Archives on an individual basis.

*Public records will be evaluated, sampled, and weeded according to archival principles by archivists from Washington State Archives (WSA). Records not selected for retention by WSA may be disposed of after appraisal.*

### ***Archival (Permanent Retention)***

Public records which possess enduring legal and/or historic value and must not be destroyed. State government agencies must transfer these records to Washington State Archives (WSA) at the end of the minimum retention period.

*WSA will not sample, weed, or otherwise dispose of records fitting the records series description designated as "Archival (Permanent Retention)" other than the removal of duplicates.*

### ***Disposition***

Actions taken with records when they are no longer required to be retained by the agency.

*Possible disposition actions include transfer to Washington State Archives and destruction.*

### ***Disposition Authority Number (DAN)***

Control numbers systematically assigned to records series or records retention schedules when they are approved by the State Records Committee.

### **Essential Records**

Public records that state government agencies must have in order to maintain or resume business continuity following a disaster. While the retention requirements for essential records may range from very short-term to archival, these records are necessary for an agency to resume its core functions following a disaster.

*Security backups of these public records should be created and may be deposited with Washington State Archives in accordance with Chapter 40.10 RCW.*

### **Non-Archival**

Public records which do not possess sufficient historic value to be designated as “Archival”. Agencies must retain these records for the minimum retention period specified by the appropriate, current records retention schedule.

*Agencies should destroy these records after their minimum retention period expires, provided that the records are not required for litigation, public records requests, or other purposes required by law.*

### **Non-Essential Records**

Public records which are not required in order for an agency to resume its core functions following a disaster, as described in Chapter 40.10 RCW.

### **OFM (Office Files and Memoranda)**

Public records which have been designated as “Office Files and Memoranda” for the purposes of RCW 40.14.010.

*RCW 40.14.010 – Definition and classification of public records.*

*(2) “Office files and memoranda include such records as correspondence, exhibits, drawings, maps, completed forms, or documents not above defined and classified as official public records; duplicate copies of official public records filed with any agency of the state of Washington; documents and reports made for the internal administration of the office to which they pertain but not required by law to be filed or kept with such agency; and other documents or records as determined by the records committee to be office files and memoranda.”*

### **OPR (Official Public Records)**

Public records which have been designated as “Official Public Records” for the purposes of RCW 40.14.010.

*RCW 40.14.010 – Definition and classification of public records.*

*(1) “Official public records shall include all original vouchers, receipts, and other documents necessary to isolate and prove the validity of every transaction relating to the receipt, use, and disposition of all public property and public income from all sources whatsoever; all agreements and contracts to which the state of Washington or any agency thereof may be a party; all fidelity, surety, and performance bonds; all claims filed against the state of Washington or any agency thereof; all records or*

*documents required by law to be filed with or kept by any agency of the state of Washington; ... and all other documents or records determined by the records committee... to be official public records."*

### **Public Records**

#### **RCW 40.14.010 – Definition and classification of public records.**

*"... The term "public records" shall include any paper, correspondence, completed form, bound record book, photograph, film, sound recording, map drawing, machine-readable material, compact disc meeting current industry ISO specifications, or other document, regardless of physical form or characteristics, and including such copies thereof, that have been made by or received by any agency of the state of Washington in connection with the transaction of public business..."*

### **Records Series**

**A group of records, performing a specific function, which is used as a unit, filed as a unit, and may be transferred or destroyed as a unit. A records series may consist of a single type of form or a number of different types of documents that are filed together to document a specific function.**

### **State Records Committee**

**The committee established by RCW 40.14.050 to review and approve disposition of state government records.**

*Its four members include the State Archivist and one representative each from the Office of the Attorney General, Office of the State Auditor, and the Office of Financial Management.*

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